

Upstream Dialogue

Steward in Training Students from across western Canada were joined by industry volunteers to take part in Energy in Action. The program teaches students about stewardship of resources and builds environmental projects in their school yards.

► Check out the faces at this year's events.

Student shown from Sidney Street School in Maple Creek, SK.

CAPP Events & Updates

CAPP Speaker Series

– Alberta Progressive Conservative
Leadership Dialogue
September 7, 12 p.m. Calgary, AB

CAPP Speaker Series –

Vivian Krause – Journalist
September 12, 12 p.m. Calgary, AB



Vivian Krause

Caravaggio and His Followers in Rome –
CAPP sponsored event
June 17 – September 11, Ottawa, ON

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2011 Canadian Crude Oil Forecast released

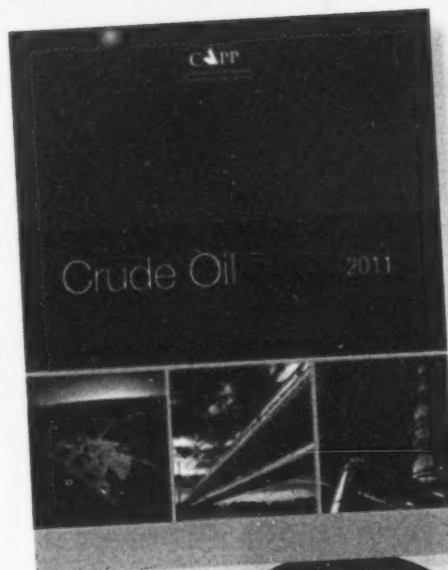
CAPP released its annual Canadian Crude Oil Forecast and Market outlook on June 2, 2011.

The release forecasts that oil sands growth and new production from existing conventional oil reserves will drive Canadian crude oil production to about 4.7 million barrels per day by 2025.

"CAPP's 2011 Crude Oil Forecast, Markets and Pipeline Outlook reaffirms the trend of rising Canadian oil production over the next 15 years," said Greg

Stringham, vice-president of markets and oil sands at CAPP. "Expanding access to existing markets in the U.S. and diversifying into Asian markets are important to enable this production growth and to ensure Canadian producers receive competitive prices for their products."

- Read the [CAPP news release](#) announcing the report.
- Access the [2011 Canadian Crude Oil Forecast and Market Outlook](#).



2.6 million

In 2010 Canada produced 2.8 million barrels of oil per day.

The Facts on Oil Sands

CAPP's Canadian version of the oil sands fact book has recently been updated and reprinted. View the new version [online](#) or request [printed copies](#).

About Canada's Oil Sands

Canada's oil sands are important to the U.S. economy and energy security. Global demand for energy continues to rise and Canada has the third largest oil reserves in the world with 97% of these reserves in the oil sands. Canada's oil sands help supply America's energy needs while also creating American jobs and strengthening our broader economic relationship.

About Canada's Oil Sands is a pocket book designed to inform and educate Americans on oil sands economic and energy security impacts in the U.S. as well as environmental performance and technology. Printed booklets are available at no cost to CAPP members and are ideal for distribution to government, media, member company employees and other stakeholders such as organized labour and think tanks.

- Access the online version of [About Canada's Oil Sands](#).
- To order printed copies of *About Canada's Oil Sands* send your request to publications@capp.ca.

1000 companies

At least 1000 American companies supply goods and services to Canadian oil sands and pipeline companies.

Source: CAPP

465,000 jobs

U.S. employment resulting from new oil sands developments is expected to grow from 21,000 jobs in 2010 to 465,000 jobs in 2035.

Source: CERI 2011

Trusted neighbours

Canada is the largest supplier of crude oil and petroleum products to the U.S.

News Highlights

- ▶ Greg Stringham, CAPP vice president, oil sands and markets, contributed a piece to the discussion "[What role should oil sands play in the world's future energy mix?](#)" on [commentvisions.com](#).
- ▶ CAPP President Dave Collyer writes about the market challenges for natural gas in the [latest installment of Oilweek's Association Corner](#).
- ▶ The Pembina Institute and The David Suzuki Foundation released the report [Is natural gas a climate change solution for Canada?](#) which challenges natural gas as a bridge fuel to lower Canada's green house gas emissions.
- ▶ Tom Huffaker, CAPP vice president, policy and environment, responds to the report in a [letter in the Edmonton Sun](#) and papers across Canada.
- ▶ CAPP released [CAPP on Energy Strategy](#) which outlines a Canadian energy strategy that would enable us, as a country, to develop policies and take actions aligned with a collective vision of our energy future.

Oil sands stories hit airwaves

Canada's oil sands industry has recently released a new series of television and print advertising. The new ads feature Total E&P's Jacob Handel, Canadian Natural Resources' Joy Romero and Dr. David Lynch of the University of Alberta. The ads speak about the oil sands industry commitment to innovation, community and the environment.

Advertising is one element of a broader effort to improve our communications with stakeholders and the public, both in Canada and internationally.

- ▶ Check out the [television advertisements](#).
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Collyer speaks coast to coast for oil and gas industry



talked about Canada's energy future, highlighting the need for responsible

CAPP President Dave Collyer spoke at the Canadian Responsible Investment Conference in Victoria, BC on June 20. Collyer

development of Canada's energy resources.

On June 22 Collyer participated in a panel discussion on sustainability at the Newfoundland and Labrador Oil and Gas Industries Associations' annual conference in St. John's, NL. The presentation focused on the need for a Canadian energy strategy to enable us as a country

Rising Stars

The best and the brightest in the Canadian oil and gas industry were celebrated on June 29th as part of Oilweek's 2011 Class of Rising Stars. The class was celebrated in style with a sold-out crowd of enthusiastic supporters at the elegant Hotel Arts.

- ▶ Learn more about [Oilweek's 2011 Rising Stars](#).
- ▶ [Nominations for 2012](#) are now open.



The rising stars shown here from left to right are: Warren Heisler, president, Lereve Energy Corp; Todd Hirsch, senior economist, ATB Financial; Greg Brady, manager, aboriginal relations, Devon Canada; Derek Keller, vice-president, production, Laricina Energy Ltd.; Tim Shipton, president, Alberta Enterprise Group; Heather Christie-Burns, president and COO, Angle Energy Inc.; Mike Nieleen, general manager, Enviro Vault Canada Ltd; Allan Carswell, vice-president of exploration and COO, Palliser Oil & Gas Corporation; Susannah Pierce, head, government relations, Shell Canada; Pierre Magnan, Partner, Gowling Lafleur Henderson LLP; Agnes Zalewski, group publisher, JuneWarren-Nickle's Energy Group; Ray Akl, project manager, Vista Projects Limited. Missing from the group photo are Rising Stars Sandra Minifie, CEO and owner, Action Health & Safety Services and Brian Boulanger, senior vice-president and director, ARC Financial Corp.

to develop policies and take actions to balance economic growth, environmental protection and energy security.

- ▶ All of CAPP's presentations are available online at [www.cspp.ca](#).

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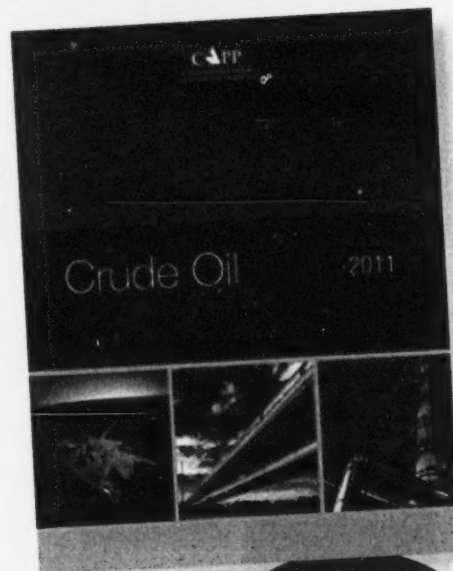
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Employee Perspectives

Creating environmental understanding through community engagement

Name: Dave Wizinsky

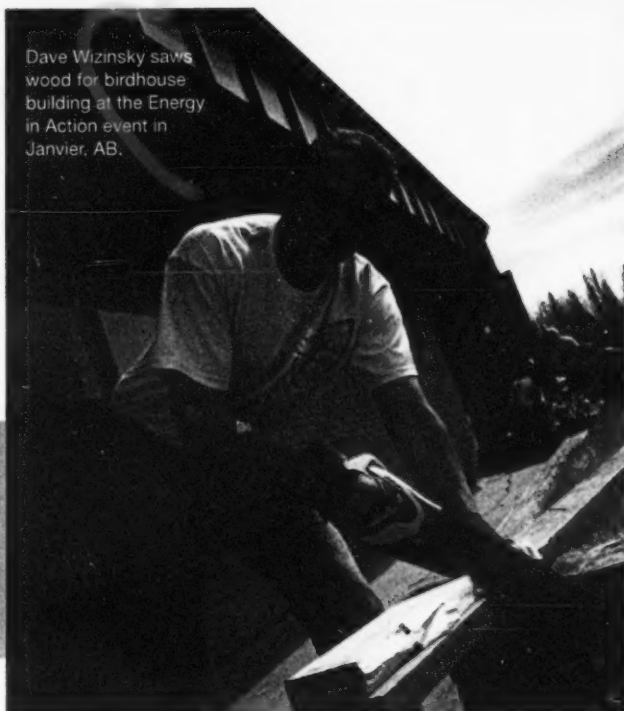
Title: Director and Corporate Secretary

Company: MEG Energy

Location: Victoria, BC

Years of Experience: 12 years with MEG, 25 years in resource industry

Dave Wizinsky saws wood for birdhouse building at the Energy in Action event in Janvier, AB.



It's not every day that an executive of an oil and gas company can take time away from the office to work with school children in operating communities, but for Dave Wizinsky, corporate secretary and a director of MEG Energy, it's a very important experience.

For the past two years, Wizinsky has been taking time from his busy schedule in Victoria, BC to participate in CAPP's Energy in Action program. In 2010, Wizinsky and his daughter Kathryn joined the EIA team in Lac La Biche and Heart Lake, AB, and in 2011 Wizinsky brought his wife Mieke and son Mark to assist in Conklin and Janvier, AB.

"We're part of a larger community," explains Wizinsky, "I believe that the success of this organization is attributed to the great people who are involved with MEG, and those people come from the community."

Wizinsky credits the Energy in Action program as being a key facilitator in bridging understanding between the community and industry. He describes the

program as a move to engage industry and stakeholders, creating a platform for positive change.

"People want to know what we're doing," says Wizinsky. "Listening to communities in which we operate, reinforces the responsibility energy companies have to develop business while reminding us that we should lead the way in energy literacy, moving forward as an industry with new educational initiatives."

"I strongly believe in energy literacy and environmental education for the industry."

Wizinsky has had some rewarding experiences during his Energy in Action days. Last year in Heart Lake, Wizinsky noticed a young man who was disengaged from the rest of the students. A community member explained that this behavior was typical of the student. Wizinsky took it upon himself to talk with the boy and build a birdhouse with him. The two quickly bonded and created a birdhouse with a

Spiderman theme, which matched with the student's shirt. "It's connections like this that make the program so unique," says Wizinsky.

Besides working in the community, Wizinsky explains that the greatest aspect of his job is having the opportunity to create work for young people who are up and coming in the industry.

"I enjoy helping the young minds of tomorrow understand the industry, as I feel they represent our future and we can learn a lot from them," he says.

Wizinsky's and MEG's continued commitment to the Energy in Action program has complimented the work they do. Wizinsky says that he will "absolutely" be returning in 2012.

"It's great for stakeholders to realize that we also live in those communities – we breathe the same air, we hike on the same trails and we care very much about the environment we live in."



2011 CAPP Oil & Gas Investment Symposium

CAPP held its 2011 Investment Symposium on June 13 to 15. This signature event gave over 250 institutional investors from Canada, the U.S. and around the world a chance to get a close up look at the Canadian oil and gas industry. Delegates attended presentations from 47 CAPP member companies and had the opportunity to meet face-to-face with senior executives from member companies presenting.

- Learn more about [CAPP's 2011 Oil and Gas Investment Symposium](#).
- View [webcasts](#) of CAPP member company presentations.
- Download the [CAPP member company presentations](#).

Alberta is Energy



Alberta is Energy highlights the important relationship that exists between a healthy industry and a thriving economy, and the positive impact the oil and gas industry has on communities throughout the province. We are bakers, mechanics, sales people, store owners, real estate agents, rig workers, engineers, bankers, truckers and more. We are the people that keep Alberta moving.

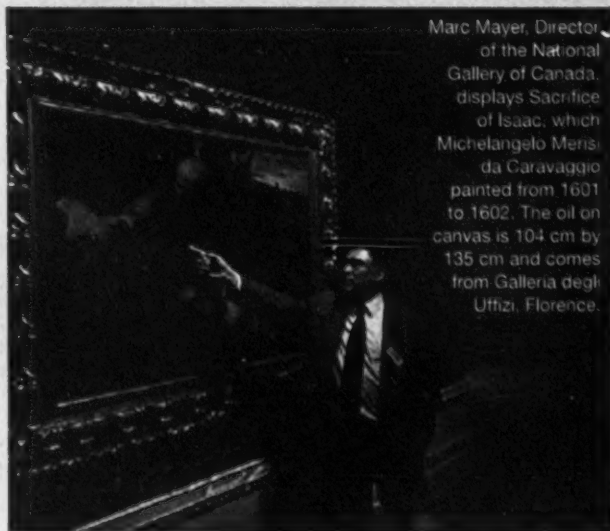
Every Albertan can agree that a strong oil and gas industry creates revenue for the province, creates jobs throughout Alberta, and provides the building blocks for quality public programs and the growth of other businesses and sectors.

Caravaggio in Ottawa

Canada's oil sands producers are proud to be the lead sponsor of Caravaggio and His Followers in Rome, an exhibition at the National Gallery in Ottawa, June 17 – September 11, 2011. The exhibition explores the impact of Caravaggio's work on a wide range of painters who resided in Rome.

On June 22, CAPP hosted an invitation only event at the National Gallery in Ottawa, which included an exclusive tour of Caravaggio by the Gallery's Executive Director, Mr. Marc Mayer, and one of the exhibit curators.

- Find out more about the [Caravaggio exhibit in Ottawa](#).



Marc Mayer, Director of the National Gallery of Canada, displays *Sacrifice of Isaac*, which Michelangelo Merisi da Caravaggio painted from 1601 to 1602. The oil on canvas is 104 cm by 135 cm and comes from Galleria degli Uffizi, Florence.

This summer, Alberta is Energy will launch new profiles showcasing the men and women of Alberta, their careers, challenges and accomplishments. Our goal is to build awareness of how the energy industry touches our lives.

One of our profiled Albertans is Gale Katchur, Mayor of Fort Saskatchewan, a city that plays host to more than 21 heavy and light industry plants.

Mayor Katchur is quick to point out the influence of industry on her residents' quality of life. "Industry sponsorship supported the construction of the Dow Centennial Centre, the Urban Forest, our Community Hospital Foundation, the 1875 North West Mounted Police Fort, as well as many recreation, cultural and social programs delivered by the city and our community groups."

- Read more of [Gale Katchur's profile](#).
- Access [all Alberta is Energy profiles](#).

Upstream Scene

Energy in Action 2011

The Energy in Action program was back in western Canadian schools this May to educate students about energy literacy and to help build sustainable environmental projects, each tailored to the school's environmental vision.

Presented by CAPP and over 30 oil and gas companies, Energy in Action visited 10 schools – Alberta: Cold Lake, Iron River, Edson, Conklin and Janvier; Saskatchewan: Maple Creek and Oxbow; and British Columbia: Farmington, Fort Nelson and Dawson Creek.

Reflecting the oil and gas industry's increasing commitment to the communities in which we operate, Energy in Action's 2011 projects ranged from rejuvenating green spaces, to building outdoor classrooms, to learning about local bird habitat by building birdhouses. Students also received a presentation about natural resources delivered by Inside Education.

► Learn more about [Energy in Action](#).

► Learn more about [Inside Education](#)



1. Jessica Yarnell of Cenovus at Father R. Perrin School in Janvier, AB. 2. Mark Wilfur of Talisman with students from Ecole Westhaven School in Edson, AB. 3. Gerald Clark of Crescent Point with students from Prairie Horizons School in Oxbow, SK. 4. Dave Wizinsky of MEG with students from Conklin Community School in Conklin, AB. 5. Selma Losic of Inside Education with a student from Parkland Elementary School in Farmington, BC. 6. Students from Cold Lake Elementary School in Cold Lake, AB. 7. Alison Jenkins from Apache with students from Chalo School in Fort Nelson, BC. 8. Lucie Duffy of Devon Canada with a student from Iron River School in Iron River, AB. 9. Jamie Brown from Golder Associates at Father R. Perrin School in Janvier, AB.

Innovation and Technology

Study uses scat to track wildlife in oil sands

The first study of its kind in the oil sands has found a higher than expected population of caribou in and around Statoil's SAGD Project near Conklin.

The study, led by Dr. Samuel Wasser of the Center of Conservation Biology at the University of Washington, was funded by Statoil as part of its Environmental Impact Assessment.

Wasser, a pioneer in non-invasive methods for studying wildlife, used trained detection dogs to locate scat (animal feces). This was analyzed to glean information about three different animal populations: wolf, caribou and moose. Before being collected and sent to the lab for DNA and hormone analysis, the scat is geo-referenced with GPS technology.

"It's an exciting blend of science," says Tim Shopik, Manager of Regulatory Affairs for Statoil Canada. "We're using domestic dogs trained to locate scat from wild animals, we're using local community members who have traditional knowledge and using satellites for GPS referencing. From this data you obtain habitat preferences from sample locations and diet, DNA and a hormone-based health panel from lab analyses of the samples themselves. It is unique how the research was able to study multiple interacting species and responses while using only a single sampling regime." The innovative study design provides a new and accurate method for monitoring the effects of human development on wildlife in oil sands areas.

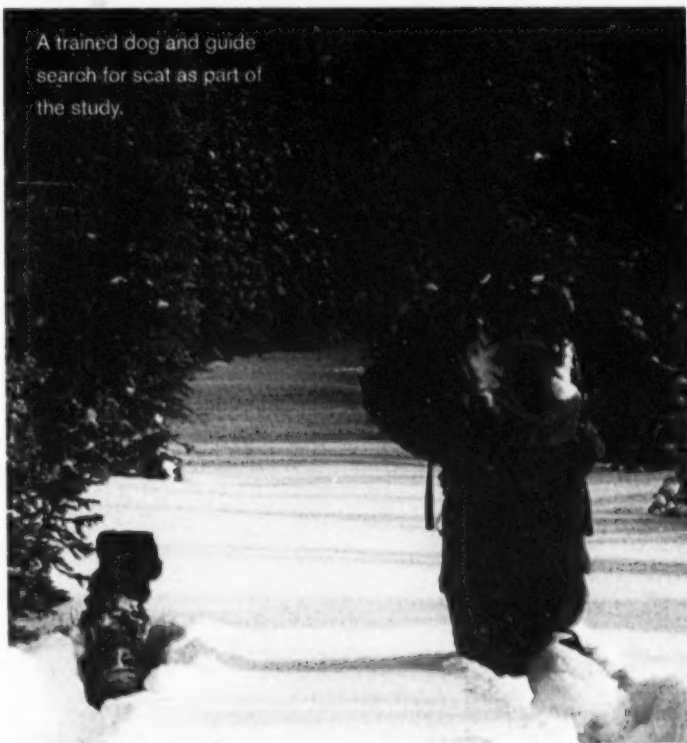
In addition to finding more caribou than expected, the study gathered a lot of information about wolves. "Wolves are using cut-lines to move across the lands," says Shopik. "The caribou are

"The scat data also provides the first statistically valid population estimates for the three wildlife species."

an incidental kill." The scat analysis shows that wolves target deer-rich areas, which pulls wolves away from prime caribou habitats. Wolf diet consists of approximately 10 per cent caribou, 80 per cent deer and 10 per cent moose in winter.

The study showed that caribou will use linear disturbances that are not used by humans and therefore are not snow packed. However, "If the linear disturbance is being heavily used by humans then caribou tend to shy away," says Shopik. The opposite trend seems to be the case for wolves, which are presumably using

A trained dog and guide search for scat as part of the study.



snow-packed features for ease of travel. "We have accurate data on where caribou and wolves like to be in the winter and we're planning some techniques to reduce the movement of wolves into prime caribou areas."

Shopik says Statoil has selected some cut-lines and blocked them with logs in an attempt to reduce the use of these features by travelling wolf packs. "We will be placing remote cameras to monitor how effective the treatments are and if they reduce wolf traffic. This might be an effective technique that we can start using to reduce caribou mortalities from wolves."

The scat data also provides the first statistically valid population estimates for the three wildlife species. "The combined information greatly expands our understanding of the implications of forest fragmentation and how to better manage and minimize disturbances," says Shopik.

"We're going through the study trying to understand the results and trying to figure out what we can do better."

► Read the study: [The influences of wolf predation, habitat loss, and human activity on caribou and moose in the Alberta oil sands.](#)





Industry Practice and Regulations

Industry supports draft plan for Lower Athabasca region

CAPP has provided its input to the draft Lower Athabasca Regional Plan (LARP), which will guide oil sands development in the Lower Athabasca region of Alberta.

During LARP's third phase of consultation, which ended in early June, CAPP reaffirmed its support for key elements of the plan including:

- The policy balance for sustainable development
- The cumulative effects management approach through effects-based management frameworks
- The placement of conservation areas in a broader provincial context to manage both the boreal region and boreal caribou while enabling sub-surface resource development

In general, LARP is a progressive step in the implementation of

balanced land use planning and cumulative effects management in Alberta. However, CAPP believes there are several important issues with LARP that need to be addressed, including expropriation of rights and commensurate compensation, incomplete management frameworks and potential unintended consequences arising from the new regulations.

CAPP has recommended the Alberta government reaffirm its commitment to the Alberta Land Stewardship Act and Land Use Framework, re-affirm its intention to implement LARP quickly once these issues are addressed and confirm its intentions regarding conservation areas and management frameworks that are well-advanced.

► Read more about [LARP](#)

Alberta's regulatory enhancement draft legislation for fall

The Alberta government finished another round of stakeholder consultations in June after releasing *Enhancing Assurance: Developing an Integrated Energy Resource Regulator*, a report outlining a single regulator's key functions and processes and recommendations on how to move to a single regulator.

The report's recommendations are being included in draft legislation that should be ready for the next sitting of the Alberta legislature (the Progressive Conservative party will select its new leader by the beginning of October).

In May, the province announced plans to establish an integrated, effective and efficient single regulator to replace the current system which can require interaction with at least three agencies – Environment, Sustainable Resource Development and the Energy Resources Conservation Board.

As part of the Alberta Competitiveness Review, the province established a Regulatory Enhancement Project Task Force in March 2010 to review Alberta's regulatory system – analyzing existing processes and holding extensive engagement with First Nations, the oil and gas industry, landowner, municipal and environmental groups – and ultimately providing recommendations to improve Alberta's regulatory system.

The task force made six recommendations, including creating an enhanced regulatory system comprised of two key functions: policy development – performed by the Government of Alberta – and policy assurance, performed by a single regulator for the energy sector.

► Read *Enhancing Assurance: Developing an integrated energy resource regulator*

► Learn more about the [Regulatory Enhancement Project](#)



BC creating new oil and gas strategy

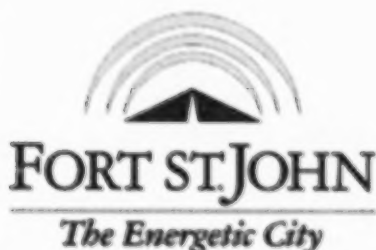
The BC Government wants to develop a new natural gas strategy, to include ways to bring electricity to the natural gas fields, mitigate greenhouse gas emissions in natural gas exploration and come up with plans to both accelerate the use of natural gas in the transportation sector and develop infrastructure such as new gas-to-liquid facilities.

In June, the BC energy minister, Rich Coleman, asked the Parliamentary Secretary for Natural Gas to begin consulting with the oil and gas industry and report back by the end of August. These consultations are ongoing.

Coleman also asked the Parliamentary Secretary for Clean Technology, John Yap, to consult with industry in an effort to improve market-based regulations for low-carbon fuels.

By the end of the summer, Yap will develop a report outlining how the province can move toward the use of low-carbon fuels without sacrificing its competitive position. Yap's office has contacted CAPP to discuss how it can assist with industry consultations. CAPP has also contacted the Ministry of Energy and Mines to discuss policy for around low carbon fuels and arrange a meeting with the CAPP Low Carbon Fuel Standards Sub Group.

► Read the BC Department on Energy and Mines report *Ultimate Potential for Unconventional Natural Gas in Northeastern British Columbia's Horn River Basin*.



2nd annual Energy Expo in BC

CAPP, in collaboration with Energy Services BC, will host the second annual Energy Expo September 21 - 22 in Fort St. John, BC.

Last year's Energy Expo brought together more than 400 people from the local service sector with natural gas and petroleum producers, fostering local economic development and job creation.

The expo provides a forum to exchange information on procurement and bidding procedures and contracting criteria, as well as required qualifications for employment.

It helps increase awareness among local companies and business leaders about the oil and gas industry, its opportunities, entrepreneurship programs and other resources to help local businesses become qualified bidders. It also provides a forum for local businesses to build relationships with oil and gas companies and petroleum services providers.



The Facts on Oil Sands receives Gold Quill Award

CAPP's publication Upstream Dialogue: The Facts on Oil Sands 2010 received a prestigious Gold Quill award from the International Association of Business Communicators. The book was awarded the Gold Quill Excellence Award in the Publications Category. Accepting on behalf of CAPP was Kari Vickers, who served as the editor and project manager of The Facts on Oil Sands 2010. She is also the former editor of Upstream Dialogue.

Left: Kari Vickers of CAPP receives the Gold Quill award for The Facts on Oil Sands 2010.

CAPP Speaker Series

The CAPP Speaker Series brings thought-provoking speakers to talk to CAPP members about issues confronting the upstream oil and gas industry. On July 20 CAPP hosted three of the Alberta Progressive Conservative Leadership hopefuls – Ted Morton, Alison Redford and Rick Orman – as they discussed the political issues facing the oil and gas industry.

Save the date!

CAPP will be hosting a second leadership candidate dialogue on September 7 at 12 p.m. at the Metropolitan Centre in Calgary. This event will feature Gary Mar, Doug Griffiths and Doug Horner. Please register to attend the event.

Save the date!

CAPP will also be hosting journalist Vivian Krause on September 12 at 12 p.m. at the Metropolitan Centre in Calgary. You can register for this event here.



Canadian Association of Petroleum Producers (CAPP)

The Canadian Association of Petroleum Producers (CAPP) represents companies, large and small, that explore for, develop and produce natural gas and crude oil throughout Canada. CAPP's member companies produce more than 90 per cent of Canada's natural gas and crude oil. CAPP's associate members provide a wide range of services that support the upstream crude oil and natural gas industry. Together CAPP's members and associate members are an important part of a national industry with revenues of about \$100 billion-a-year.

If you would like to receive this newsletter directly from CAPP, email your request to upstreamdialogue@capp.ca.

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